
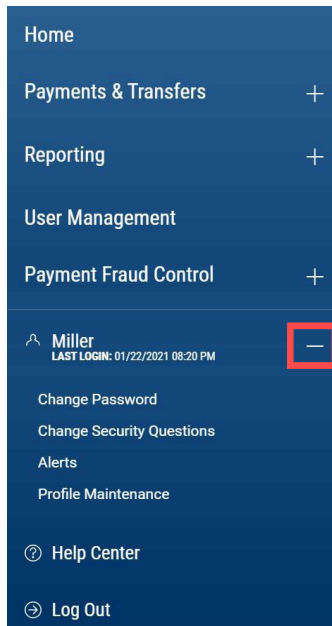


Main menu

- Click on the 3-line icon on upper left corner, just below the Washington Trust logo to expand the side menu:

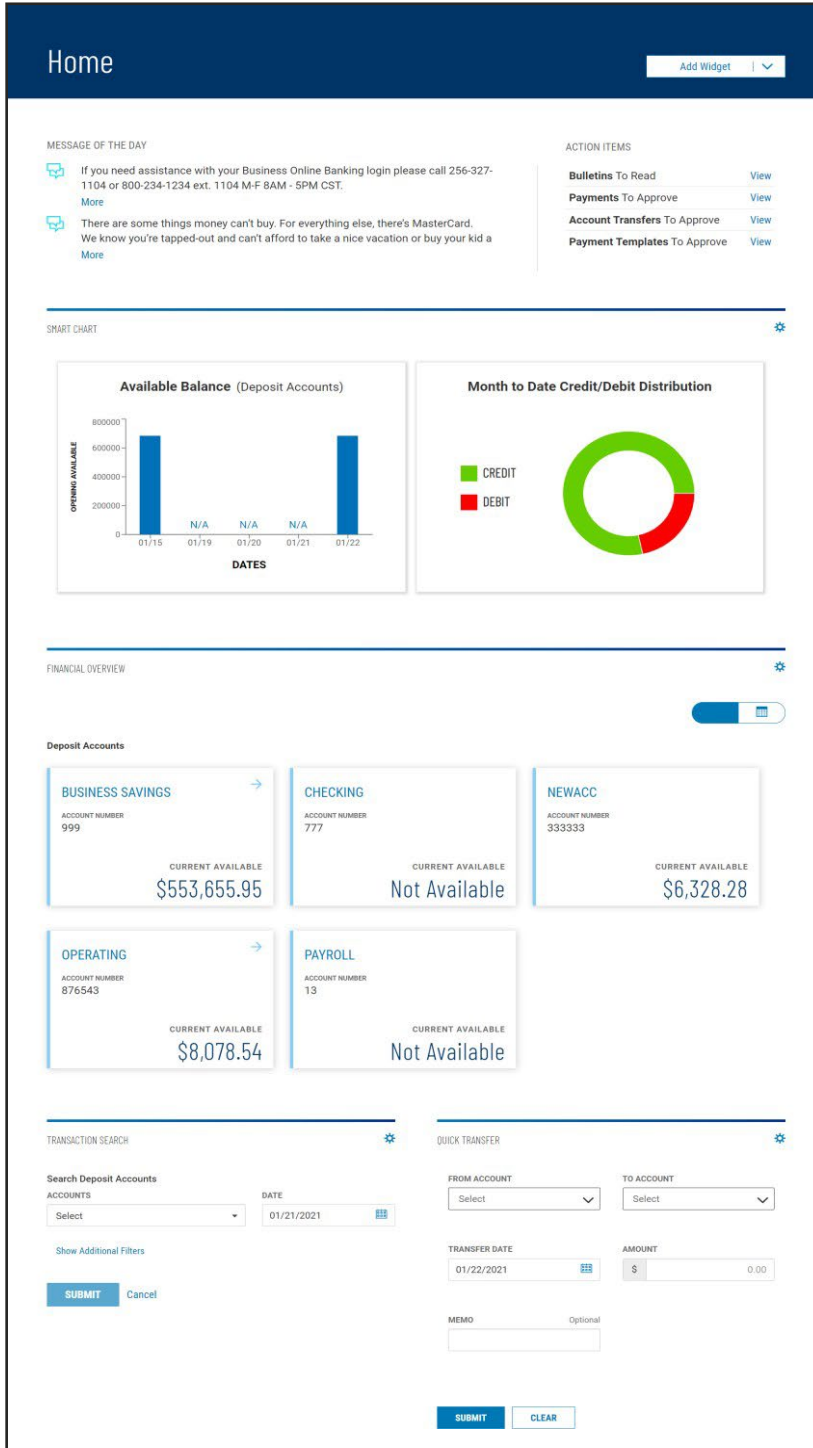


- The side menu displays the available workspaces, selecting the  will expand additional menu selections
- Expand your “User Name” to show user account related additional menu:



Home page (as an example)

- Also known as the Dashboard, your landing page is a Workspace.
- Each workspace presents various information in sections known as Widgets.
- The Home workspace includes a Notification widget accompanied by a collection of other widgets based on the functionality you have access to (i.e., viewing account balances or initiating account transfers).



Home Add Widget

MESSAGE OF THE DAY

If you need assistance with your Business Online Banking login please call 256-327-1104 or 800-234-1234 ext. 1104 M-F 8AM - 5PM CST. [More](#)

There are some things money can't buy. For everything else, there's MasterCard. We know you're tapped-out and can't afford to take a nice vacation or buy your kid a [More](#)

ACTION ITEMS

- [Bulletins To Read](#) [View](#)
- [Payments To Approve](#) [View](#)
- [Account Transfers To Approve](#) [View](#)
- [Payment Templates To Approve](#) [View](#)

SMART CHART

Available Balance (Deposit Accounts)

DATES	OPENING AVAILABLE
01/15	~700,000
01/19	N/A
01/20	N/A
01/21	N/A
01/22	~700,000

Month to Date Credit/Debit Distribution

Legend: CREDIT (Green), DEBIT (Red)

FINANCIAL OVERVIEW

Deposit Accounts

Account Name	Account Number	Current Available
BUSINESS SAVINGS	999	\$553,655.95
CHECKING	777	Not Available
NEWACC	333333	\$6,328.28
OPERATING	876543	\$8,078.54
PAYROLL	13	Not Available

TRANSACTION SEARCH

Search Deposit Accounts

ACCOUNTS: DATE: [Show Additional Filters](#)

[SUBMIT](#) [Cancel](#)

QUICK TRANSFER

FROM ACCOUNT: TO ACCOUNT:

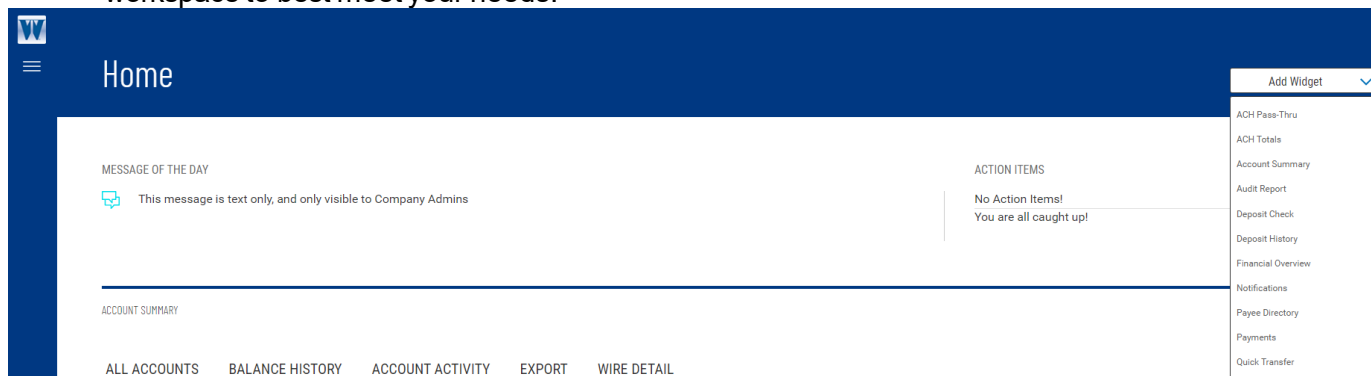
TRANSFER DATE: AMOUNT:


MEMO:

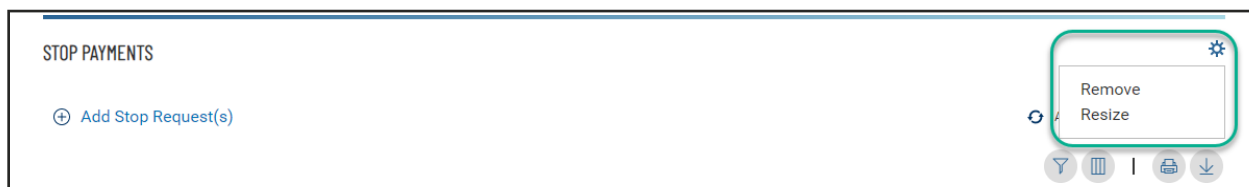
[SUBMIT](#) [CLEAR](#)

Workspace

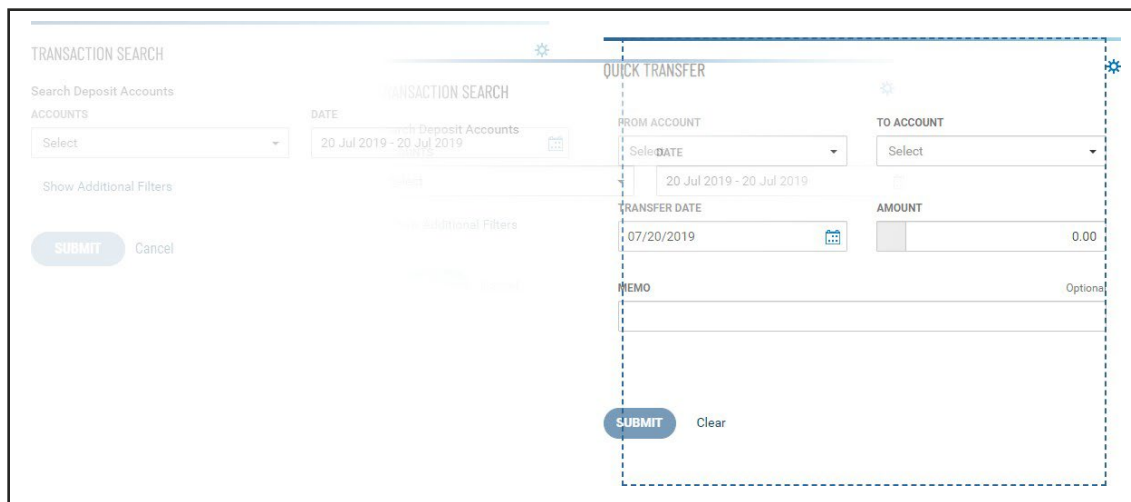
- Each workspace is a page with system default widgets relevant for that workspace (i.e., on the Stop Payments Workspace you would see a Stop Payments widget).
- Workspaces offer the ability to add, remove, resize, and arrange widgets to personalize the workspace to best meet your needs.



Any widgets on any workspace with a gear  icon in the upper right corner means it can be repositioned (moved), resized or deleted (removed):





To move a widget, click on the top part of the widget being moved, then drag and drop:

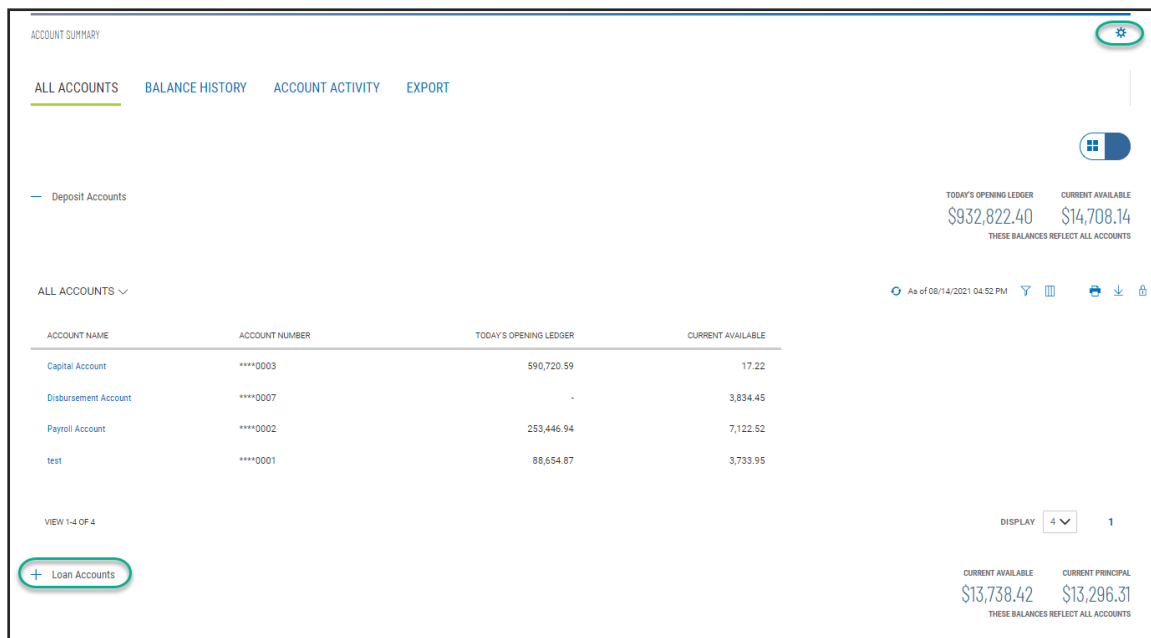


Widget

A widget is a single focused component that presents action(s) and information with common purpose in a List View, such as view account information, place a stop payment or make an account transfer.

While each widget focuses on different purpose, widgets have a set of standard capabilities:

1. Repositionable, resizable and removable as described previously under Workspace for widgets with an  icon.
2. Present sub-category of information in additional list views.  indicates there is more info to be expanded –



ACCOUNT SUMMARY

ALL ACCOUNTS BALANCE HISTORY ACCOUNT ACTIVITY EXPORT

Deposit Accounts

TODAY'S OPENING LEDGER \$932,822.40 CURRENT AVAILABLE \$14,708.14
THESE BALANCES REFLECT ALL ACCOUNTS

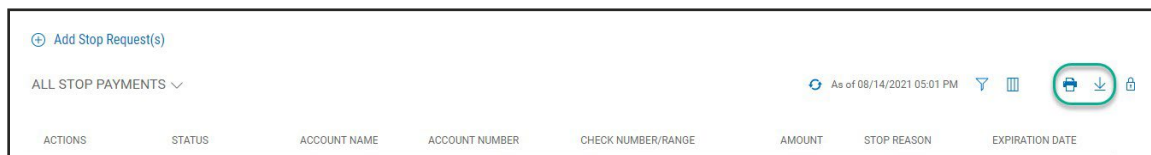
ACCOUNT NAME	ACCOUNT NUMBER	TODAY'S OPENING LEDGER	CURRENT AVAILABLE
Capital Account	****0003	590,720.59	17.22
Disbursement Account	****0007	-	3,834.45
Payroll Account	****0002	253,446.94	7,122.52
test	****0001	88,654.87	3,733.95

VIEW 1-4 OF 4

+ Loan Accounts

CURRENT AVAILABLE \$13,738.42 CURRENT PRINCIPAL \$13,296.31
THESE BALANCES REFLECT ALL ACCOUNTS

3. Print the data you see or export all the data in the widget within your range settings -



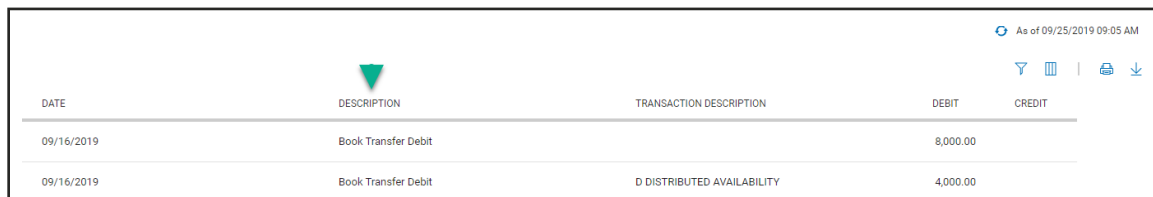
Add Stop Request(s)

ALL STOP PAYMENTS

ACTIONS	STATUS	ACCOUNT NAME	ACCOUNT NUMBER	CHECK NUMBER/RANGE	AMOUNT	STOP REASON	EXPIRATION DATE
---------	--------	--------------	----------------	--------------------	--------	-------------	-----------------

CURRENT AVAILABLE \$13,738.42 CURRENT PRINCIPAL \$13,296.31
THESE BALANCES REFLECT ALL ACCOUNTS

4. Sort data in a column by clicking on the header –



As of 09/25/2019 09:05 AM

DATE	DESCRIPTION	TRANSACTION DESCRIPTION	DEBIT	CREDIT
09/16/2019	Book Transfer Debit		8,000.00	
09/16/2019	Book Transfer Debit	D DISTRIBUTED AVAILABILITY	4,000.00	

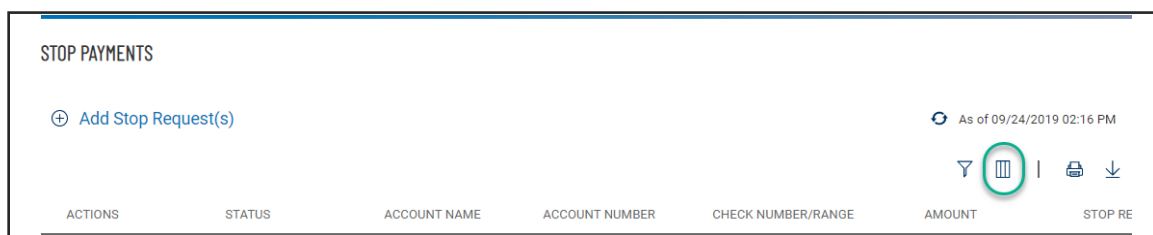
☐ Indicates sorted column



As of 09/25/2019 09:05 AM

DATE	DESCRIPTION	TRANSACTION DESCRIPTION	DEBIT	CREDIT
09/16/2019	Book Transfer Credit	D DISTRIBUTED AVAILABILITY		4,000.00
09/16/2019	Book Transfer Credit			55,000.00

5. Click on column icon to arrange order of column display –



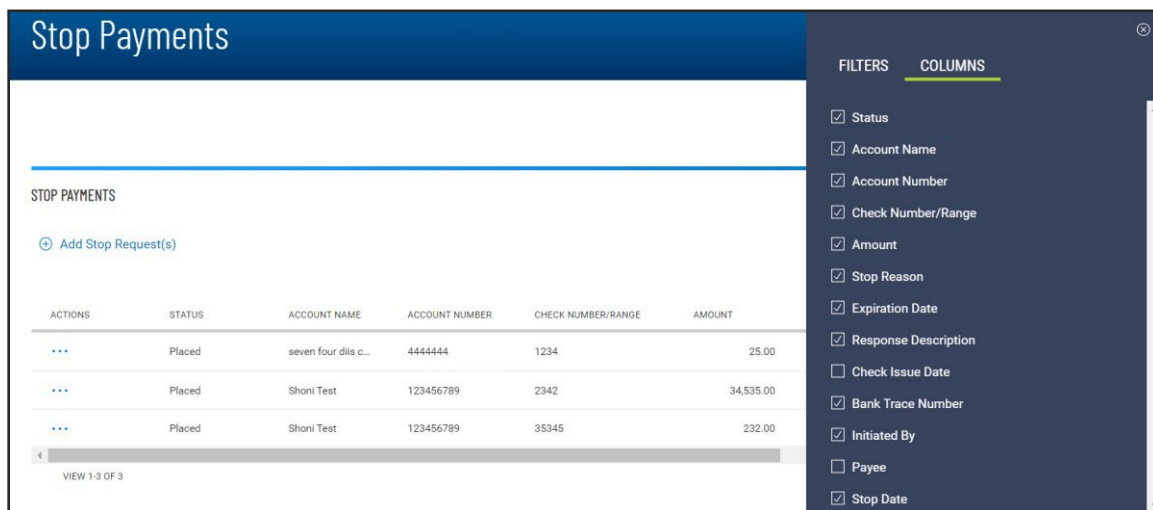
STOP PAYMENTS

+ Add Stop Request(s)

As of 09/24/2019 02:16 PM

ACTIONS	STATUS	ACCOUNT NAME	ACCOUNT NUMBER	CHECK NUMBER/RANGE	AMOUNT	STOP RE
---------	--------	--------------	----------------	--------------------	--------	---------

From the slide-out menu, select and deselect desired data, drag and drop data to rearrange order



Stop Payments

STOP PAYMENTS

+ Add Stop Request(s)

ACTIONS	STATUS	ACCOUNT NAME	ACCOUNT NUMBER	CHECK NUMBER/RANGE	AMOUNT
...	Placed	seven four dils c...	4444444	1234	25.00
...	Placed	Shoni Test	123456789	2342	34,535.00
...	Placed	Shoni Test	123456789	35345	232.00

VIEW 1-3 OF 3

FILTERS COLUMNS

- ☒ Status
- ☒ Account Name
- ☒ Account Number
- ☒ Check Number/Range
- ☒ Amount
- ☒ Stop Reason
- ☒ Expiration Date
- ☒ Response Description
- ☐ Check Issue Date
- ☒ Bank Trace Number
- ☒ Initiated By
- ☐ Payee
- ☒ Stop Date

6. Click on filter icon to narrow in on specific transactions –

STOP PAYMENTS

⊕ Add Stop Request(s)

As of 09/24/2019 02:16 PM

🔍

🗑️

|

🖨️

⬇️

ACTIONS	STATUS	ACCOUNT NAME	ACCOUNT NUMBER	CHECK NUMBER/RANGE	AMOUNT	STOP RE
---------	--------	--------------	----------------	--------------------	--------	---------

From the slide-out menu, select data to filter and set perimeters to zone in on the transactions

Stop Payments

STOP PAYMENTS

⊕ Add Stop Request(s)

⊕

Save

FILTERS

CHECK ISSUE DATE (1)

STOP DATE (1)

AMOUNT (1)

Show Values

ACTIONS	STATUS	ACCOUNT NAME	ACCOUNT NUMBER	CHECK NUMBER/RANGE	AMOUNT	STOP RE
---------	--------	--------------	----------------	--------------------	--------	---------

VIEW 0 OF 0

FILTERS

COLUMNS

> Account Name

> Account Number

> Amount

Clear

Equals

500.00

> Bank Trace Number

> Check Issue Date

Clear

> Check Number/Range

> Expiration Date

Clear

2019-08-25 - 2019-09-25

> Initiated By

> Payee

> Response Description

> Status

> Stop Date

Apply

7. Save your personalized view for reuse–

When you adjust the default view by sorting a column, changing column display order, adding/removing column(s) or filtering any data, input filed automatically presents for you to save that view with a unique name

⊕ Add Stop Request(s)

As of 09/26/2019 02:57 PM

⊕

Save

FILTERS

STOP REASON (1)

Show Values

ACTIONS	STATUS	ACCOUNT NAME	ACCOUNT NUMBER	CHECK NUMBER/RANGE	AMOUNT	STOP REASON	EXPIRATION DATE	RESPONSE DESC
...	Placed	seven four dils c...	4444444	1234	25.00	fraud		Stop Payment rx
...	Placed	Shoni Test	123456789	2342	34,535.00	fraud		Stop Payment rx
...	Placed	Shoni Test	123456789	35345	232.00	fraud		Stop Payment rx

VIEW 1-3 OF 3

DISPLAY

All

 1

⊕ Add Stop Request(s)

As of 09/26/2019 02:57 PM

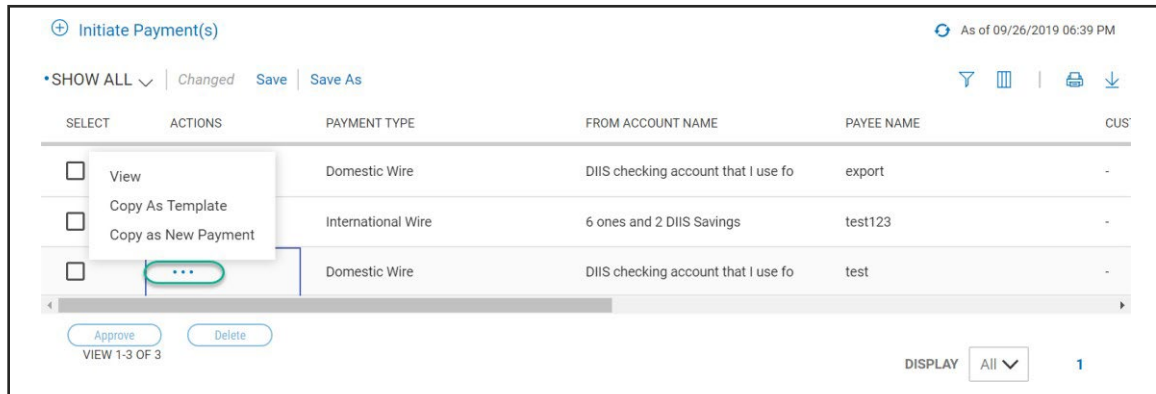
⊕

Save

ACTIONS	ACCOUNT NAME	ACCOUNT NUMBER	CHECK NUMBER/RANGE	AMOUNT	STATUS	STOP REASON	EXPIRATION DATE	RESPONSE DESC
...	seven four dils c...	4444444	1234	25.00	Placed	fraud		Stop Payment rx
...	Shoni Test	123456789	35345	232.00	Placed	fraud		Stop Payment rx
...	Shoni Test	123456789	2342	34,535.00	Placed	fraud		Stop Payment rx

8. Take individual or bulk action –

- Individual action –



As of 09/26/2019 06:39 PM

•SHOW ALL ▾ | Changed Save Save As

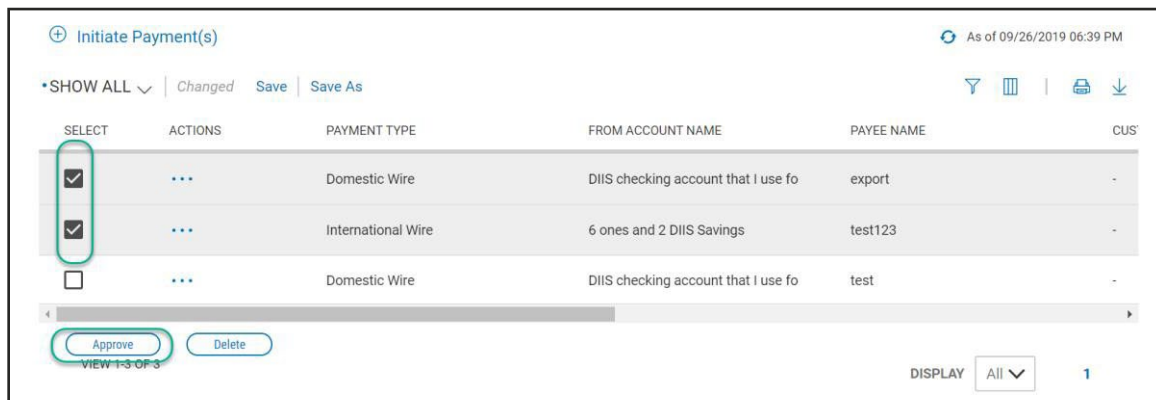
Filter, Sort, Print, Download icons

SELECT	ACTIONS	PAYMENT TYPE	FROM ACCOUNT NAME	PAYEE NAME	CUS
<input type="checkbox"/>	View Copy As Template Copy as New Payment ...	Domestic Wire	DIIS checking account that I use fo	export	-
<input type="checkbox"/>	...	International Wire	6 ones and 2 DIIS Savings	test123	-
<input type="checkbox"/>	...	Domestic Wire	DIIS checking account that I use fo	test	-

Approve VIEW 1-3 OF 3 Delete

DISPLAY All ▾ 1

- Bulk action –



As of 09/26/2019 06:39 PM

•SHOW ALL ▾ | Changed Save Save As

Filter, Sort, Print, Download icons

SELECT	ACTIONS	PAYMENT TYPE	FROM ACCOUNT NAME	PAYEE NAME	CUS
<input checked="" type="checkbox"/>	...	Domestic Wire	DIIS checking account that I use fo	export	-
<input checked="" type="checkbox"/>	...	International Wire	6 ones and 2 DIIS Savings	test123	-
<input type="checkbox"/>	...	Domestic Wire	DIIS checking account that I use fo	test	-

Approve VIEW 1-3 OF 3 Delete

DISPLAY All ▾ 1